E-rate Planning Calendar April 2000-January 2001

Provided by the Education Technology Office, California Department of Education (CDE)

> Note: **<u>All deadlines and suggested actions are tentative or subject to amendment</u>** by the Federal Communication Commission (FCC), the Universal Service Administrative Company's Schools and Libraries Division (USAC/SLD), and others.
> Please visit the CDE's E-rate web site (http://www.cde.ca.gov/erate/) and the SLD web site (http://www.sl.universalservice.org/whatsnew/default.asp#yr1inv) for updates and revisions.

> (✔) Each California county office of education (COE) has an individual identified as the E-rate lead, and it is advised that school and district applicants use this resource as the first step in seeking answers.

> (✔) The CDE, in collaboration with others, will offer **trainings** in the summer and fall to:
> ⇨ Prepare for the Year 4 "window filing."
> ⇨ Strengthen the knowledge base of those already managing E-rate discounts.

General	If an entity is not using the California Teleconnect Fund (CTF) discount program to lower telephone costs on most common services by 50%, they should do so by contacting their phone services vendor and asking for the application materials. It is much simpler than E-rate and may be used in tandem with E-rate: E-rate first, then CTF.	District tech plans should be approved by COE for services (other than telephone service only). Applicant should have plan approval certification on file by the time the goods and services are received.	Should file Form 486 immediately after services are first received. In the case of recurring services, it is whenever the discounts were first applied (may have been July 1 of the fiscal year), In the case of internal connections, it is as soon as the project is completed and ownership has changed hands.
DATE	**YEAR 2 (1999-2000)**	**YEAR 3 (2000-2001)**	**YEAR 4 (2001-2002)**
April 2000	District tech plans should have been approved by COE for services (other than telephone service only) received in FY1999-2000. Applicant should have plan approval certification on file by the time the goods and services are received.	District tech plans should be approved by COE for services (other than telephone service only) to be received in FY 2000-2001. Applicant should have plan approval certification on file by the time the goods and services are received.	District tech plans should be in a revision cycle for FY2001-2002.
April 2000	Should have received results of YEAR 2 appeals. If not, call SLD Help Line at 888-293-8100.		
April 2000		Should have received your Receipt Acknowledgement Letter (RAL) from SLD for your YEAR 3 471s.	
April 2000		May be involved in Program Integrity Assurance (PIA) justification on YEAR 3 471s.	

April 2000		May receive your Funding Commitment Letter (FCL) from SLD for your YEAR 3 471s. Reminder: If corrections or appeals are necessary, there are tight deadlines!	
April 2000	Only 2-3 months left to complete YEAR 2 internal connection projects (by June 30, 2000), unless SLD extends deadline		
April 2000		Check all existing contracts (LEA-generated, CMAS, or state master contract, such as CALNET) to see that expiration dates and extension components fit the YEAR 3 E-rate requirements and can be agendized before your Board if necessary	
April 2000		For YEAR 3 projects, review your Board deadlines to act on any contingent contracts, based on FCLs.	
May 2000		Should receive your Funding Commitment Letter (FCL) from SLD for your YEAR 3 471s. Reminder: If corrections or appeals are necessary, there are tight deadlines!	
May 2000		May be able to file early YEAR 3 486 to prepare for services as of July 1, 2000.	
June 2000		Should have received your Funding Commitment Letter (FCL) from SLD for your YEAR 3 471s. Budgeting based on YEAR 3 FCLs should be agendized with Board, if appropriate. Reminder: If corrections or appeals are necessary, there are tight deadlines!	
June 2000	Should be completing final YEAR 2 internal connection projects. Contracts and ownership issues should be agendized with Board, if appropriate.		
June 2000		IF YEAR 3 internal connection projects are started before July 1, 2000 (not a preferred approach), applicant cannot claim any costs incurred before July 1, 2000.	

June 2000			Initial plans for YEAR 4 should be underway. Planning should include training of personnel responsible for filing forms and managing discounted projects.
June 2000	If the YEAR 2 completion date for internal connection projects is extended (to September 30?), then project work done between July 1, 2000 and the new deadline will qualify for approved discounts. Otherwise, June 30 is the last day to claim discounts for E-rate Program Year 2.		
July 2000 *Year 2 ends Year 3 starts*	July 1, 2000 ends the YEAR 2 service window (unless it is extended).	July 1, 2000 starts the YEAR 3 service window. Approved recurring discounts should appear on bills and continue through June 30, 2001; costs for internal connections projects may be discounted from this date through June 30, 2001. Should file YEAR 3 486 immediately after services are first received. In the case of recurring services, it is whenever the discounts were first applied (may be July 1, 2000), and in the case of internal connections, it is as soon as the project is completed and ownership has changed hands. 486s are also used to report termination and other major services changes.	
July 2000			July 1, 2000 is the earliest date to file a Form 470 for tariffed or month-to-month services for YEAR 4, FY 2001-2002. For contract services, you can file the Form 470 any time as long as it is posted for at least 28 days before the contract is signed. SLD sends Form 470 filers a letter stating the earliest date they can contract (called "allowable contract date").
July 2000		Any discounted services received after July 1, 2000, except only basic phone service, are required to be	Fiscal pre-planning for YEAR 4, FY 2001-2002, should begin at the LEA level, to be ready to accurately file YEAR 4

		covered under an already-approved tech plan.	470s and 471s in "window."
August 2000			YEAR 4 planning should be moving toward completion. Check all existing contracts (LEA-generated, CMAS, or state master contract, such as CALNET) to see that expiration dates and extension components fit the E-rate requirements and can be agendized before your Board if necessary
Sept. 2000			Major projects not already included on a prior 470 should be identified for a YEAR 4 470. The "evergreen" 470 can be filed for recurring costs as soon as July 1 of the year before the start of services, thus establishing the basis for a forthcoming 471.
October 2000			All major FY2001-2002 eligible expenses should be identified. Changes in recurring service may require new 470.
Nov. 2000			Mid-November is likely opening of the "window" to file 471s.
Dec. 2000			File 471s (online is best)
January 2001			Mid-January is likely closing of the "window" to file 471s.